

INFORMATION AND COMMUNICATION SERVICES NIH - TASK ORDER

RFTOP# 55 TITLE: Consumer Advocates in Research and Related
Activities (CARRA) Program Evaluation

PART I - REQUEST FOR TASK ORDER PROPOSALS

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B. PROPOSED PERIOD OF PERFORMANCE: Two years from date of award (target award date is 4/5/02). The award will be renewable for up to 3 option years.

C. PRICING METHOD: Time and Materials. Currently available funding for year one is limited to \$100,000. Up to \$100,000 is available for the second year. Option years 3, 4, and 5 are negotiable. A firm that is able to complete this project for less than that amount is invited to propose a lower price for the successful execution of this task. Price will be a consideration in the determination of the firm that is selected for award. NIH is of the opinion that this funding is adequate, but if in the opinion of your firm this is not a sufficient amount to successfully achieve the stated objectives, please specify how to best spend available funds, which tasks will remain undone, and the additional funding necessary to complete the requirement. Firms should address the benefits and drawbacks for alternate approaches.

D. PROPOSAL INSTRUCTIONS: Proposals should be submitted to me by e-mail. Please enter in the subject line the following text, "RFTOP# 55- Proposal from {insert your firm's name}." A signed task order form will later be requested from the selected firm. In addition to the information described below, proposals should include a section that details two possible strategies for evaluation of the CARRA program. Each suggested strategy should be no more than 2 pages typewritten single-spaced. This section should also describe the merits and drawbacks of each strategy. Also, the suggested strategies should recognize that a fast timeline is required for initial effort in

developing the evaluation plan and putting the first steps of the evaluation plan into practice.

E. RESPONSE DUE DATE: Monday, March 25, 2002 at Noon local time.

F. TASK DESCRIPTION:

BACKGROUND

In order to accomplish its mission to reduce the burden of cancer morbidity and mortality, and ultimately to prevent the disease, the National Cancer Institute (NCI) supports a broad range of programs in basic and clinical biomedical and behavioral research and training. These include programs to understand the causes of cancer; prevent, detect, diagnose, treat, and control cancer; and disseminate information to the practitioner, patient and public.

In carrying out these programs, the NCI divisions and offices frequently work with consumer advocacy organizations, scientific and professional organizations, and federal agencies. The Liaison Activities (LA) Branch was established in 1996 to serve as the central point of contact at NCI for these groups, which are key constituents of NCI. LA is responsible for communicating, cooperating, and collaborating with these organizations to promote common goals.

Individuals affected by cancer and those who represent them - consumer advocates - offer unique and important perspectives that enhance the NCI's efforts to reduce the Nation's cancer burden. As lay representatives, consumer advocates represent the concerns of those affected by cancer and bring a sense of urgency to the research agenda. They put a human face on the Nation's cancer burden. Their presence in the scientific dialogue about cancer stimulates a straightforward presentation of ideas that often enhances scientific clarity. Over the past decade consumer advocates have become increasingly involved in working with the NCI to establish priorities across NCI's many programs. For example, they served as members of NCI advisory, planning, and review committees, and were active partners in peer review, site visits, program planning and development, publication and video review and development, and communications planning and implementation activities.

In the past, an informal process was used to involve consumer advocates at NCI. There was no formal system or screening in place to help NCI staff find and select appropriate advocates. There also was no uniform training or orientation to help advocates effectively participate. NCI recognized the value of creating formalized processes for advocate inclusion, and recognized that advocates who were matched with NCI activities based on their training and personal experiences would be able to contribute more to each activity.

In September 2001 LA launched the Consumer Advocates in Research and Related Activities (CARRA) program, providing a formalized process for involving consumer advocates across the full spectrum of NCI activities. Two CARRA program goals were established in order to provide a clear focus for program development and to ensure accountability for program outcomes:

Goals:

- Ensure opportunities for consumer advocates to work as lay representatives with the NCI in establishing research priorities and designing and implementing cancer programs
- Foster an organizational atmosphere that values the contributions and perspectives of consumer advocates

The CARRA program was created with the input of the consumer advocacy community and key NCI staff. In the Spring of 2000, the Liaison Activities Branch, working in partnership with the Director's Consumer Liaison Group (DCLG), an all-consumer advisory board to the Director of the NCI, began to gather information to serve as a foundation for a more uniform process that would facilitate greater involvement of consumer advocates in NCI programs and initiatives.

LA conducted interviews with over forty NCI staff and consumer advocates. These interviews provided valuable information about consumer involvement at NCI. Following these interviews, the NCI convened the Consumer Advocates in Research (CAR) Workshop in September 2000. The meeting produced a "best practices" document, which served as guiding principles in the development of the CARRA program.

To provide clear direction about how CARRA program goals are to be achieved, guiding principles were established. These principles reflect NCI's commitment to the inclusion of consumer advocates' and the value it places on their unique perspectives.

Guiding Principles

The CARRA program should:

- Involve consumer advocates and NCI staff in developing and refining NCI's procedures for involving consumer advocates
- Foster an understanding of and value for consumer advocates' perspectives and contributions
- Routinely evaluate, and as necessary modify, CARRA activities and procedures

CARRA program procedures must:

- Reflect NCI's stature as a national-level agency that is accountable to the public
- Reflect the needs of NCI staff, scientists, clinicians and consumer advocates

- Be fair, open and impartial
- Ensure diversity among the consumer advocates working with the NCI
- Ensure that the roles of all participants and the purpose of activities involving consumer advocates are clearly defined
- Ensure that all participants are educated about their own and each other's roles

In addition, 5 general program aims were established:

Aims:

The CARRA program will:

- Increase the involvement of people affected by cancer in NCI activities
- Increase the diversity of consumers involved
- Match NCI activity and program needs to advocates' skills and interests
- Support advocates and NCI staff working together
- Provided a "ready and waiting" network of qualified advocates

Supporting consumer advocate involvement is essential to achieving CARRA goals. LA is responsible for coordinating these support activities and for serving as a resource center to assist Institute staff in identifying and involving consumer advocates in their activities. The CARRA program supports consumer advocate involvement by focusing on the needs of the Institute's staff and programs as well as those of consumer advocates. LA is responsible for removing these obstacles to involvement and establishing accessible, user-friendly processes for involving consumer advocates.

CARRA currently consists of 218 consumer advocates. Approximately one-third of the CARRA membership (71 CARRA members) are advocates with experience participating in NCI activities. These advocates were "grandfathered" into the CARRA program to serve as mentors to those CARRA members who were inexperienced in participating in NCI activities.

In September 2001 all members were given the opportunity to participate in one of three orientation teleconferences, and comprehensive orientation materials were provided through a CARRA website (<http://la.cancer.gov/carra>). CARRA staff communicate regularly with CARRA members through email (the CARRA members' preferred method of communication), the CARRA website, and phone calls. Since the start of the CARRA program in September, there have been over 30 requests for CARRA members to participate in various NCI activities.

Current Evaluation Activities

LA has instituted the following evaluation activities. It is expected that the contractor will incorporate these activities into the CARRA evaluation plan. It is expected that the

contractor will input all data collected from these activities, will use statistical software to analyze the data, and incorporate the analyses into reports for LA. If the budget allows, the contractor will assist with distributing questionnaires and following up on their return.

1. A tracking system for CARRA activities is in place, and monthly reports are produced by LA detailing the utilization of the CARRA program by NCI staff members.

Monthly reports include:

- the number of requests for CARRA members made by NCI staff
- details about the NCI staff who are requesting CARRA member participation in their activities
- the kinds of activities CARRA members are involved in

Data for the monthly reports is contained in an Access database developed by Liaison Activities. A list of available fields from this database is attached to this task order. Contractors will not be expected to produce monthly reports, but will be expected to use the data as necessary.

2. Between October 2001 and January 2002 a 20-item attitude and behavior survey was distributed to over 400 NCI staff members who were in positions to use the CARRA program.

The survey consists of:

- 14 general attitude items on a traditional 5-point Likert scale (attitudes towards consumer involvement at NCI)
- 6 demographic or behavioral items

The purpose of the survey is to establish a baseline organizational attitude towards consumer involvement. Currently the data from the Time 1, baseline attitudes and behavior survey are in an SPSS data file. The contractor will be expected to implement an appropriate Time 2 distribution of the attitude and behavior survey in order to help evaluate program goals. The contractor will be expected to collect, input, and analyze data from the Time 2 distribution of this survey. The contractor will also be expected to make comparisons with Time 1 data and produce a report that analyzes and summarizes the results of the Time 1 and Time 2 distribution of the survey.

3. Currently, two questionnaires are being developed to help evaluate the processes of the CARRA program and satisfaction of CARRA members and NCI staff. The questionnaires consist of approximately 20 close-ended 5-point Likert scale items and approximately 5 open-ended questions. All items address the individual's experience with the CARRA program, CARRA members, and NCI staff. The

questionnaires are intended to be completed shortly after the CARRA member participates in an NCI activity.

Specifically, the questionnaires are:

- CARRA Member Post-Activity questionnaire – evaluates the experience of CARRA members after they have participated in an NCI activity
- NCI Staff Post-Activity questionnaire – evaluates the experience of NCI staff members after they have involved a CARRA member in their activity

Although the questionnaires are currently being implemented in a hard-copy format they will eventually be web-based questionnaires, hosted by an NCI server. There is no current data source or data management tool for these questionnaires as they are under development. CARRA members who have participated in NCI activities, and NCI staff who have requested CARRA member participation in their activities, up to this point in time have not been given an opportunity to provide feedback about their experiences. The contractor is expected to incorporate the refinement of these questionnaires and a method to gather feedback from CARRA members who have participated in activities and NCI staff who have requested them to the current time, into the evaluation plan. Also, the contractor is expected to input and analyze all data associated with this process. The contractor will produce a report at least twice during a calendar year regarding the results of these questionnaires and associated data collection.

PURPOSE

The purpose of this task order is to obtain contract support for a comprehensive program evaluation of the CARRA program. The contractor should be able to design and implement a comprehensive and methodologically sound program evaluation. The evaluation design should:

- A. incorporate the goals and objectives of the CARRA program and existing evaluation measures and data
- B. be adaptive and able to incorporate future potential evaluation activities as well as changes in the CARRA program's structure or operations
- C. be easily integrated into daily program activities, so that the collection of evaluation data and application of data-based recommendations becomes a standard part of CARRA operations

The contractor should become familiar with the history and development of the CARRA program, the daily management activities of the CARRA program, and LA staff resources and constraints. The contractor should also work closely with LA throughout the

evaluation, and should take a proactive role in suggesting measurable program objectives and modifications as part of the program evaluation plan.

The contractor should have expertise in practical program evaluation design and implementation. In addition, the contractor should have extensive experience with a range of methodologies, including qualitative and quantitative techniques (such as: survey research and questionnaire design, focus groups, interviewing techniques, familiarity with quality control for data entry and data management). Also, the contracting team should present solutions that are grounded in evaluation theory and balanced with real-world applications for eventual publication and scrutiny by NCI research staff and members of the advocacy community.

The evaluation plan should address all components of the CARRA program:

- Application to the CARRA program by members of the Public
- Selection of CARRA members
- Orientation of CARRA members
- Education for and support of NCI staff regarding the CARRA program
- Matching CARRA members with NCI activities
- Utilization of the CARRA program by NCI staff
- LA role in supporting the CARRA program

Audiences that must participate in the evaluation are:

- grandfathered CARRA members
- CARRA members with no previous experience with participation in NCI activities
- any CARRA members who may join the program at a later date
- NCI staff who use the CARRA program
- LA staff

It may be necessary for other audiences to participate in the evaluation. LA will provide access to all necessary participants, and will work with the contractor to gain access to any suggested and approved additional audiences.

Tasks

The Contractor will provide the technical and functional activities needed for program management of this SOW, including productivity and management methods such as quality assurance, work breakdown structure, and human engineering at the contract level. The Contractor will provide the centralized administrative, clerical, documentation and other related functions. Liaison Activities will manage and oversee the regular operation of the CARRA program.

The Contractor will provide project management staff who have strong communication and interaction skills and a customer service focus that can serve as a translator between the LA Project Officer and the research and design contract staff. The Contractor is responsible for quality assurance, evaluating the accomplishments of the research and data entry staff, and ensuring that the evaluation plan is being implemented in a timely and methodologically sound manner. The Contractor is responsible for ensuring that all data is completely accurate. The Contractor will provide data entry and data maintenance support until the end of the contract period. The Contractor will anticipate potential problems and advise the Project Officer about project direction and implications of direction and/or decisions. The LA Project Officer will make all final decisions regarding any data collection, reports, and interactions with other NCI staff and CARRA members.

The Contractor will prepare a Task Order Management Plan describing the technical approach, organizational resources, and management controls to be employed to meet the cost, performance and schedule requirements throughout task order execution.

The Contractor will provide written meeting summaries within 2 business days of each meeting with LA staff. These summaries shall (a) summarize discussion (b) present next steps, timing, and the organization responsible for each next step. If a phone conversation between LA and the Contractor results in additional assignments, changes in direction or scope of work, or changes that impact the timeline, the conversation shall be considered a meeting and documented in a meeting summary.

The Contractor will provide status reports once a month (monthly). The status report will include, as a minimum, the work completed during the previous period, the tasks to be completed during the next period, funds spent and funds available in the contract.

The contractor will be expected to perform the following tasks:

1. Within 10 business days following the award of the contract, the Contractor will arrange and participate in an initial meeting with LA to discuss the CARRA program and the needs, parameters, and timeline of the evaluation plan. The general purpose of this initial meeting will be an opportunity for the Contractor to clarify information, including how best to translate program goals into measurable objectives, for the evaluation plan.
2. Within 5 business days of the initial meeting, submit to LA (a) timeline for developing the evaluation plan and (b) relevant and measurable program objectives, including outcome and process objectives, based on the CARRA program's goals, guiding principles, and aims as specified in the RFTP and discussed at the initial meeting. The complete evaluation plan will be presented to LA within 40 business days from the initial meeting with LA. The contractor will meet with LA as needed during the 40 business days of the development of the

evaluation plan, but not less than every other week (bi-weekly). All meetings will occur at LA offices.

3. Develop a comprehensive, clear, concise, practical, and theory-based master evaluation plan based on process and outcome evaluation objectives. The plan should specify the methodologies to be used to assess progress toward each of these objectives, the timing and scope of data collection activities, and the instruments required and data analysis and reporting plans for each data collection activity. The plan should include a timeline for all activities and should specify how existing CARRA evaluation activities will be incorporated. The contractor will be responsible for administering the NCI staff attitudes and behavior survey (and making comparisons to the baseline NCI staff attitudes survey), and analyzing it and all other data and feedback collected as part of the CARRA program evaluation. The Contractor shall also refine and further develop the post-activity questionnaires for CARRA members and NCI staff, and input, analyze, and report on all data from the questionnaires.
4. Provide a timeline for all work and promptly advise LA if the timeline needs to be revised.
5. Regularly attend a 1-hour, bi-weekly CARRA policy meeting held at LA offices. The Contractor shall attend and participate in discussions regarding the effect of program evaluation on CARRA program policy decisions.
6. Design and produce all needed research instruments such as questionnaires and interviewing guides.
7. Maintain a database at the Contractor's facilities, for analysis of all data collected as part of the program evaluation activities. When needed, the Contractor should design new fields to be added to the LA Access database used to match CARRA advocates to NCI activities and should enter data into these fields in order to incorporate evaluation activities into the daily management of the CARRA program.
8. Conduct all data collection activities in accordance with the master timeline.
9. Input (into a spreadsheet, database, or statistical software, as appropriate) all quantitative and qualitative data collected.
10. Analyze all data collected and report on the analysis in a form appropriate to the data. Reports will be produced for each evaluation activity (e.g. for each questionnaire, set of interviews, or feedback).
11. Use descriptive and graphical summaries to present quantitative data; written summaries to present qualitative data. All reports should include recommendations for changes to the CARRA program and operations if the data indicate such changes are warranted.
12. Manage quality control of across all tasks and products.
13. Provide 2 final reports at the end of the contract period. The first report should contain the final evaluation plan, copies of all instruments used in the evaluation, the results of the evaluation, discussion of the results and conclusions about them, any program recommendations and/or changes made based on the results, and

- program outcomes based on the recommendations made. The second report should be a final report of the tasks completed by the Contractor, and should contain a list of tasks with the proposed timeline and the actual time tasks were executed, copies of the monthly reports provided to LA, and a final summary of the work required of the Contractor and the work completed by the Contractor.
14. Provide all documents and data in hard copies and electronically.

Evaluation activities should be appropriate for the time and money available. The evaluation plan should be compatible with all NCI technology. At all times CARRA member information, NCI staff information, and evaluations of CARRA components must be kept confidential.

Clearances

All data collection activities will be conducted in accordance with OMB regulations. Clearances have already been obtained for any program development activities, questionnaires, and feedback.

G. EVALUATION FACTORS

Evaluation factors will be weighted according to the percentages below:

1. Corporate Experience (20%):

The contractor shall have experience in the following:

- ☐ Developing and conducting practical program evaluation that is grounded in solid theory, but with a focus on meeting the needs of both program goal attainment and program stakeholders.
- ☐ Preparing *brief, clear, and concise* reports and presentations from data.
- ☐ Making data-based recommendations for program modifications.

The contractor shall provide:

- ☐ Examples of previous evaluation plans and reports with recommendations.
- ☐ Example(s) of a documented and well-defined research methodologies in program evaluation.

2. Technical Evaluation (40%)

In addition, the contractor shall demonstrate:

- ☐ A clear understanding of the requirements for developing and implementing the CARRA program evaluation

- ❑ A clear understanding of evaluation practice and theory
- ❑ Familiarity and experience with the types of research methodologies likely to be useful in evaluating the CARRA program
- ❑ The ability to describe the type of data collection recommended as part of the evaluation plan
- ❑ A concern for and approach to the protection of sensitive information
- ❑ Experience designing and executing evaluation activities in phases to facilitate rapid use of findings for program modification as well as capability for program expansion and refinement over time
- ❑ Creativity and innovation in suggesting and implementing alternative approaches for meeting program goals and objectives and conducting data collection and data management
- ❑ The labor hour table must reflect an accurate understanding of the scope and requirements for the evaluation of the CARRA program

3. Staff (30%)

The contractor should provide a management plan and qualified staff to implement all aspects of the required work. Research and evaluation expertise, and the ability to implement practical solutions are critical. Credentials, experience, and availability for all staff must be presented.

4. Price (10%):

While price will not be the most important evaluation factor, proposed prices will be considered in determining the firm that represents the best value to the government.

RFTOP# 55 TITLE: Consumer Advocates in Research and Related
Activities (CARRA) Program Evaluation

PART II - CONTRACTOR'S REPLY:

TO # _____ CONTRACT #263-01-D-0 _____

Contractor:

Points of Contact:

Phone-

Fax-

Address:

TOTAL ESTIMATED COST: Pricing Method: Time and Materials

TOTAL ESTIMATED NUMBER OF HOURS:

PROPOSED COMPLETION DATE:

FOR THE

CONTRACTOR: _____
Signature Date

SOURCE SELECTION:

WE HAVE REVIEWED ALL SUBMITTED PROPOSALS HAVE DETERMINED THIS FIRM
SUBMITTED THE BEST OVERALL PROPOSAL AND THE PRICE/COST IS REASONABLE.

Billing Reference # _____

Appropriations Data: _____

(ATTACH OBLIGATING DOCUMENT IF AN ROC WILL NOT BE USED.)

RECOMMENDED:

FAX # Signature - Project Officer Date

APPROVED: _____
FAX # Signature - Contracting Officer Date

NIH APPROVAL -

CONTRACTOR SHALL NOT EXCEED THE TASK ORDER AMOUNT WITHOUT THE WRITTEN APPROVAL OF THE
CONTRACTING OFFICER & ICS COORDINATOR

APPROVED: _____

Signature -Anthony M. Revenis, J.D., NIH-ICS Coordinator

Date